

R2**REBATE PAYMENT CLAIM FORM
EMERGING RENEWABLES PROGRAM**
**RENEWABLE
ENERGY
PROGRAM**

CALIFORNIA ENERGY COMMISSION

Mail complete payment claim to:
California Energy Commission
ERP, Payment Claim
1516 Ninth Street (MS-45)
Sacramento, CA 95814-5512
Record Number _____**Payee Number** _____

[CEC use only]

[CEC use only]

Tot.Elig.Cost: \$ _____ Date CFA: _____

SRO Watts: _____ Rebate @ _____ = \$ _____

1. Confirmation of Reservation Amount

_____ has been granted a reservation of \$ _____ for a _____ kW renewable energy generating system. The reservation will expire on _____. The system is being installed at _____ and is expected to produce _____ (kWh per year). The payment will be made to the _____.

The generation system must be completed and the claim submitted with the appropriate documentation by the deadline. Claims must be postmarked by the expiration date or the reservation will expire. This reservation is non-transferable. System must be installed at the installation address and sold to the above.

2. System Equipment (Modules, Wind Turbines, Inverters, kWh Meters)

Number	Manufacturer	Model
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Total System Price \$ _____

Amount paid by customer to date: \$ _____

3. ModificationsHas any of the information in section 1 or 2 above changed? ☐ Yes ☐ No

If yes note the changes before claiming payment.

The undersigned declare under penalty of perjury that the following statements are true and correct to the best of their knowledge:

- (1) The purchaser will submit to the Energy Commission a copy of the utility "letter of authorization to operate" the system.
- (2) The electrical generating system described above and in any attached documents meets the terms and conditions of the California Energy Commission's Emerging Renewables Program and has been installed and is operating satisfactorily as of the date stated below.
- (3) The electrical generating system described above and in any attached documents is properly interconnected to the utility distribution grid and has or will be issued utility approval to operate the system as interconnected to the distribution grid.
- (4) The rated electrical output of the generating system, the physical location of the system, and the equipment identified were installed as stated above.
- (5) Except as noted above, there were no changes in the information regarding the seller, installer, purchaser, generating system specifications, installation location, or price from that information provided in the Reservation Request Form originally submitted by the undersigned.

The undersigned purchaser authorizes the Energy Commission during the term of the ERP to exchange purchaser information on this form with the purchaser's utility in order to verify compliance with the ERP requirements.

Purchaser

Print Name: _____

Signature: _____

Date: _____

Seller

Print Name: _____

Signature: _____

Date: _____

**Is payment assigned to
another party?** ☐ Yes

 If yes, attach the payment
assignment form (CEC 1038 R5)
with original signatures.

Also Attach: 1. Initial building permit and final inspection signoff; 2. Final purchase and installation invoice(s) confirming the equipment and amount paid; 3. Five-year warranty (CEC 1038 R3 form); 4. Utility letter of authorization to interconnect the system or the purchaser's authorization form to access utility data, 5. Utility bill or proof of electrical service if new construction

INSTRUCTIONS FOR THE REBATE PAYMENT CLAIM FORM (CEC 1038 R2)

The CEC 1038 R2 form is used to request payment for a completely installed and operational renewable energy system. The form specifies information about the renewable energy system that was to be installed at the time the reservation request was initiated. It also serves as a means of documenting what changes occurred from the time the reservation request was processed until the time the system was installed. The payment claim form must be submitted before the reservation expires.

Section 1. Confirmation of Reservation Amount

Self explanatory.

Section 2. System Equipment Installed

Fill in the equipment information requested including the number of units and the make and complete model number. Enter the total system price.

Section 3. Modifications

Check the "yes" box if changes were made to the system and note any changes in the information from the previously submitted Reservation Request Form. If more space is required to note changes, additional pages may be added to the form. Changes in equipment from the original application may affect its eligibility and the amount of the rebate. If no changes were made, check the "no" box.

Signatures:

The purchaser must always print and sign their name on the form. If the seller is the rebate payee, the seller must also print and sign their name on the form. Enter the date of each signature. Original signatures are required on the form.

Please indicate whether the rebate payment is to be assigned to a third party. A third party is an entity other than the purchaser or seller. If yes, please fill in the name and address in the space provided and attach the original of the assignment form (CEC 1038 R5). The assignment form must contain original signatures. Payees that assign the rebate payment to a third party will still be reported as the recipient of the payment(s) for tax purposes.

Attachments:

Several attachments to the form must also be submitted before the claim will be processed. These include:

- A copy of the building permit and final signoff
- A copy of the final purchase and installation invoices confirming equipment and amount paid
- A copy of the completed and signed CEC 1038 R3 form
- Letter of authorization from the utility to interconnect or purchaser's authorization to access utility data.
- A copy of the utility bill if the installation location was a new facility without electrical service when the reservation request was submitted,

Building Permit and Final Signoff:

The name and address on the building permit must match the installation address on the payment claim form.

Invoices:

The invoices must clearly identify the work that was done and the amount paid. This includes identifying the quantity, make and model numbers of major equipment installed and the labor charge for installation. To meet this requirement you may submit a copy of the final invoice(s) or a copy of the final contract(s) showing a zero balance or the amount paid by the purchaser. The invoice or contract should also indicate the extent to which the Commission's rebate lowered the cost of the system. Copies of bank statements, cancelled checks, or credit card statements may also be requested by Energy Commission staff. The final system price paid by the purchaser should match the price shown on any contract or invoice previously submitted. Any differences must be explained.

Warranty:

Complete and attach the CEC 1038 R3 form.

Letter of authorization from the utility to interconnect the system or purchaser signature of R2 form authorizing CEC to exchange purchaser information with the purchaser's utility. The address in the utility interconnection letter must match the address of the installed system.

Claiming a Rebate Without a Prior Reservation

To claim a rebate without a previously approved reservation, you must also submit a completed and signed Reservation Request Form (CEC 1038 R1).

Submit your request only by mail to:

ERP, Payment Claim
California Energy Commission
1516 9th Street, MS-45
Sacramento, CA 95814-5512

Allow at least 6 to 8 weeks from receipt of a complete payment claim application for payment. Payment will be mailed to the retailer or purchaser as indicated on the Reservation Request Form at the address indicated on the Payee Data Record form (STD-204), unless you have assigned payment to a third party.